

The Federal Central Processing Center needs you (and your parents if dependent) to provide documentation of your 2011 Federal Income Tax information on your FAFSA before your Federal Financial Aid eligibility can be determined by the college. If you **have already filed** your 2011 Federal taxes you can satisfy this requirement in one of two ways...

1) **UPDATE FAFSA USING THE IRS DATA RETRIEVAL TOOL (DRT) (Preferred Method)**

- Visit **www.fafsa.ed.gov** and click START HERE to update your 2012/2013 FAFSA
- Navigate to the FINANCIAL AID tab
- Select ALREADY COMPLETED under the parent and/or student Tax Information section  
A series of questions will help determine if you are eligible to use the IRS DATA RETRIEVAL TOOL (DRT). If eligible, you will be able to link to the IRS website which displays in a new window.

Then follow steps as prompted:

- If you need help you can view the HELP AND HINTS sidebar, you can utilize LIVE HELP chat on the FAFSA website, or you can always call 1-800-433-3243
- If the FAFSA site says you are not eligible for Data Retrieval then you can use option #2 (See Below).
- The updated FAFSA should be received by SUNY Orange within 2 weeks. At that time the Requirement will then get satisfied on Banner Self Service. Make sure to also complete any other requested documents posted on your Banner Self Service account to finalize your eligibility (i.e., Verification Worksheet, IVF, DVF, Affidavit & W2's etc.).

OR...

2) **REQUEST A 2011 IRS TAX RETURN TRANSCRIPT- if not eligible for Option #1**  
(PROCESS COULD TAKE UP TO 6 TO 8 WEEKS)

- To request an IRS Tax Return Transcript, please visit [www.irs.gov](http://www.irs.gov) or call 1-800-908-9946.
- If you need more detailed instructions on requesting IRS transcripts (see reverse side).
- Be sure to request a tax **RETURN TRANSCRIPT**, not an 'account transcript'!  
When you receive your transcript in the mail **YOU MUST SIGN IT** and SUBMIT it to our office along with any other requested documents.

**What if I have not yet filed my 2011 taxes?** It is recommended that you file your 2011 taxes as soon as possible. The Federal Central Processing Center has selected your FAFSA for verification which means that the student's aid package will be complete **only** after your taxes have been filed and verified. After filing you should then complete the IRS data retrieval process that's listed above.

**What if I'm not required to file my taxes?** If you won't file Federal taxes in 2011, an affidavit you **MUST** make sure you indicate this on the Tax Return Non Filers Section of the Verification Worksheet forms and complete the affidavit Verification and then submit the forms to our office. The requested worksheet can be found on your Banner Self Service and will also be mailed home to you.

# IRS TAX RETURN TRANSCRIPT REQUEST PROCESS FOR FINANCIAL AID VERIFICATION

Tax filers can request a transcript, free of charge, of their 2011 tax return from the Internal Revenue Service (IRS) in one of three ways. Due to changes in federal financial aid regulations, institutions can no longer accept copies of federal income tax returns to satisfy financial aid verification requirements. Financial aid applicants should not list SUNY ORANGE as the third party to receive the IRS Tax Return Transcript since institutions will have difficulty matching incoming IRS Tax Return Transcripts to the aid applicant. It is required that all IRS Tax Return Transcripts to be received directly by the tax filer and for all tax transcripts to be submitted to the SUNY ORANGE Office of Financial Aid in one packet. **\*Please note that the filer should sign the IRS tax return transcript at the bottom of the first page.\***

## Option #1: Online Request

- Go to the IRS Web site at [www.irs.gov](http://www.irs.gov)
- In the "Tools" section of the homepage click "Order a Tax Return or Account Transcript".
- Click "Order a Transcript".  
Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Click "Continue".
- In the Type of Transcript field, select "Return Transcript" and in the Tax Year field, select "2011". **Do not select "Account Transcript" as this is not a copy of the entire tax return.** The "Return Transcript" is the IRS document that should be requested.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

## Option #2: Telephone Request

- Available from the IRS by calling **1-800-908-9946**.
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter "2011".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

## Option #3: Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.
- Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line #4. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.
- On line 6, enter "2011" to receive IRS tax information for the 2011 tax year that is required for the 2012-2013 Free Application for Federal Student Aid (FAFSA).
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing Form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

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